

GB TOURISM SURVEY - June 2012

SUMMARY OF RESULTS

1. Headlines

- There were 11.5 million domestic overnight trips in Great Britain in June, a 2% increase from 11.3 million in 2011.
- Spend increased by 6% on the same period last year, rising to £2.3 billion, however, the number of bed nights fell by 1%.
- A more pronounced pattern emerged in England, with trips up 4% (rising from 9.2 million in 2011 to 9.5 million in 2012), spend up 13% and nights flat.
- In the year to date, the number of trips in Great Britain has declined by 3%. Nights have also declined (-7%); however, spend has increased so far this year, by 4%.
- Looking at the past 12 months, there were 7.6 million more trips taken in Great Britain compared with the same period the year before, an increase of 7%.

2. Context

- The Diamond Jubilee bank holiday (and accompanying celebrations) took place at the beginning of June this year, which added an additional holiday onto the existing spring bank holiday. There were no bank holidays in June 2011.
- Although we would have expected to see a strong boost in trips, nights and spend as a result of the four day weekend, June 2012 was the wettest June since records began in 1910, with double the average amount of rain falling during the month.

3. Trip Characteristics

- Between January and June 2012, the number of holiday trips in Great Britain decreased by 4%, from 25.5 million to 24.6 million, with nights falling by 9% and spend remaining flat.
- The number of short holiday breaks has held steady (+1%), however, a 12% decline in the number of 4+ night breaks has impacted the total volume of holiday nights.
- The number of trips to visit friends and relatives (VFR) has also decreased so far this year (-6%), as has the volume of VFR nights (-8%), with spend remaining flat.
- However, the number of business trips increased between January and June (by 8%), as did business nights (+14%) and spend (+13%). Perhaps linked to this, large towns / cities are the only destination type to see an increase in trip volumes (+2%).
- The steepest decline in trip taking is in the least affluent DE social grade group (-7%). Those with children are also taking fewer trips, down 7% since January this year.

4. Overseas Travel by UK Residents

- Trips abroad by UK residents increased in June 2012 (by 9%), likely to be a reflection of the extra bank holiday. Spend also increased, by 6%. For the year to June, trips abroad were flat while spend was slightly up (by 2%).

5. Other Tourism Surveys

- VisitEngland's Tourism Business Monitor for May and early June showed that year-to-date, 46% of accommodation providers had less visitors than over the same period in 2011. The picture among attractions was more mixed, with while 39% reporting less visitors, and 42% reporting an increase.
- England Occupancy June saw a slight decrease in room occupancy levels compared with June 2011 whilst bed occupancy rose slightly during the same period.

KEY MEASURES

Year on Year Comparison – All Trips

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
June '12									
GB	11.3	11.5	+2%	36.1	35.9	-1%	2,192	2,330	+6%
England	9.2	9.5	+4%	28.5	28.5	0%	1,666	1,881	+13%
Jan-June'12									
GB	56.2	54.7	-3%	162.0	151.4	-7%	9,644	9,977	+4%
England	46.4	45.4	-2%	130.5	121.9	-7%	7,691	8,102	+5%

Purpose of Trip – June 2012

	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	5.8	6.0	+3%	22.0	22.2	+1%	1,366	1,495	+9%
Business	1.7	1.7	+2%	3.7	4.3	+16%	446	423	-5%
VFR	3.4	3.6	+5%	9.4	8.7	-8%	339	380	+12%
England									
Holiday	4.5	4.7	+5%	16.7	16.8	+1%	998	1,169	+17%
Business	1.4	1.5	+6%	2.9	3.6	+24%	353	366	+4%
VFR	2.9	3.1	+7%	8.1	7.5	-8%	280	320	+14%

Purpose of Trip – Year to Date (January – June 2012)

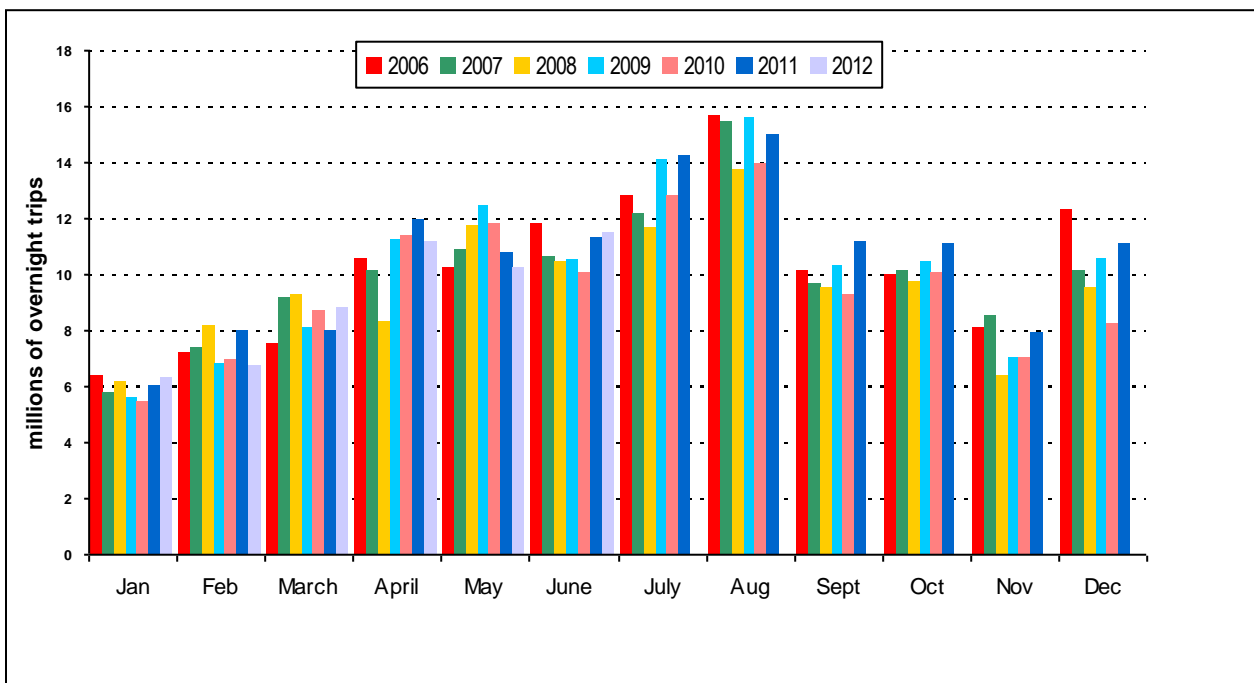
	TRIPS (MILLIONS)			NIGHTS (MILLIONS)			SPEND (£M)		
	2011	2012	% +/-	2011	2012	% +/-	2011	2012	% +/-
GB									
Holiday	25.5	24.6	-4%	84.0	76.9	-9%	5,408	5,432	0%
Business	8.7	9.4	+8%	19.0	21.5	+14%	2,054	2,323	+13%
VFR	20.0	18.7	-6%	52.7	48.3	-8%	1,939	1,944	0%
England									
Holiday	20.0	19.4	-3%	64.3	59.0	-8%	4,127	4,314	+5%
Business	7.4	7.9	+7%	15.7	18.1	+15%	1,725	1,928	+12%
VFR	17.3	16.3	-6%	44.9	40.9	-9%	1,637	1,631	0%

Outbound Travel – UK Residents

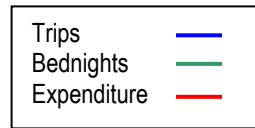
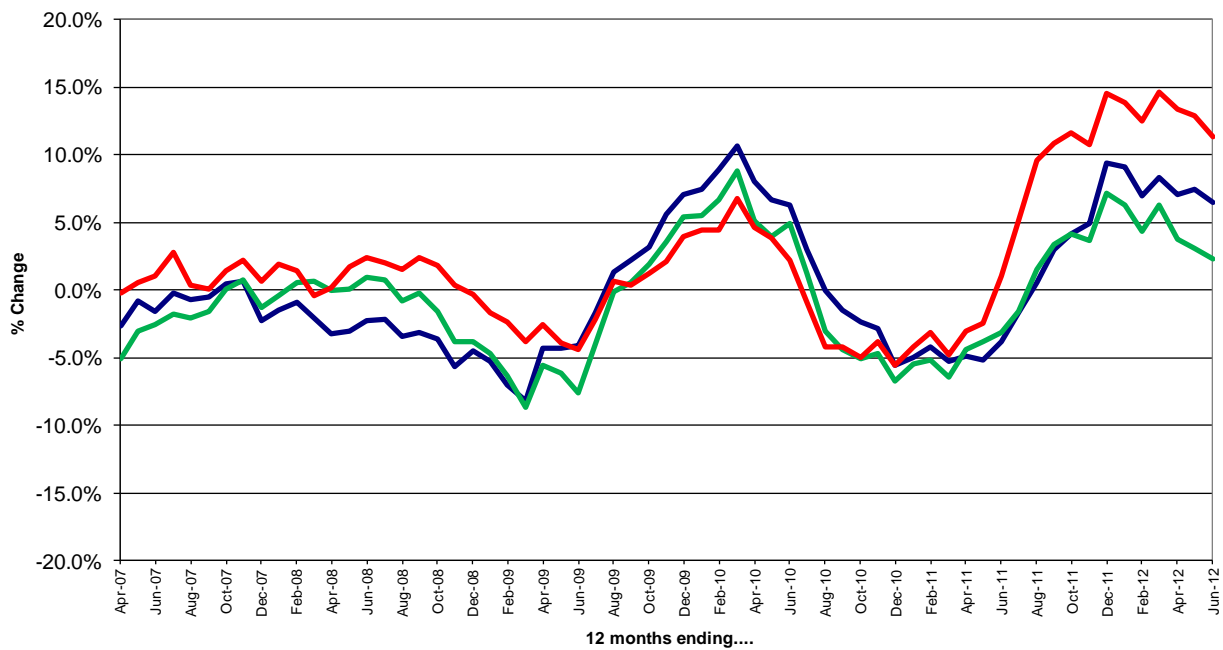
	TRIPS (MILLIONS)			SPEND (£BN)		
	2011	2012	% +/-	2011	2012	% +/-
June	5.6	6.1	+9%	3.0	3.2	+6%
January-June	25.9	25.9	0%	14.1	14.3	+2%
July '11 – June '12	56.7	56.8	0%	31.7	31.9	+1%

TREND CHARTS

GB All Trips – Domestic Trip Volume by Month



GB All Trips - Annual Percentage Change



Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (June 2011 vs. June 2012)
- Year to date (January–June 2011 vs. January– June 2012)
- 12 month rolling (July 2010 – June 2011 vs. July 2011– June 2012)

Percentage changes are colour coded:

Green indicates a change of over 5 percentage points **better** than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period)

Yellow indicates a change of within +/- 5 percentage points of the average

Orange indicates a change of more than 5 percentage points **worse** than the average

This analysis does **not necessarily indicate differences that are statistically significant**. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.

YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC

GBTS: Comparisons with equivalent periods, 2011

Comparisons with equivalent periods, 2011

LEGEND: Above Average Performance, Average Performance, Below Average Performance

NOTE: In the tables below, 'average performance' refers to the total trips/bednights/expenditure to either GB or England in each time period. Those cells marked 'above average performance' indicate where the percentage change is more than 5 percentage points above the average; those marked 'below average performance' indicate where the percentage change is more than 5 percentage points below the average. These changes are not necessarily statistically significant - they only indicate those cells where changes are further away from the average. The numbers of unweighted trips are also displayed to indicate where sample sizes are relatively small. Where there are 75 or fewer unweighted trips, the % change figures have been greyed out to indicate that they should be treated with caution.

	Month: June 2012			Unweighted Trips	YTD: January - June 2012			Unweighted Trips	12 month rolling July 2011 - June 2012			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	1.5%	-0.6%	6.3%	1681	-2.7%	-6.6%	3.5%	7859	6.5%	2.3%	11.4%	17532
PURPOSE:												
Pure Holiday	2.8%	0.8%	9.4%	904	-3.6%	-8.5%	0.4%	3644	3.3%	0.0%	7.3%	8394
- 1-3 nights holiday	0.8%	1.5%	4.4%	530	0.8%	-0.3%	9.3%	2444	7.0%	5.6%	11.8%	5195
- 4+ nights holiday	6.2%	0.5%	14.0%	374	-12.3%	-13.7%	-10.1%	1200	-2.8%	-2.9%	2.8%	3198
VFR (on holiday)	1.9%	-8.5%	2.5%	283	-1.6%	-4.0%	0.3%	1511	12.1%	8.4%	10.3%	3482
HOLIDAY (TOTAL)	2.6%	-1.0%	8.5%	1186	-3.0%	-7.3%	0.4%	5154	5.7%	2.0%	7.8%	11876
VFR (non-holiday)	8.7%	-6.6%	26.7%	262	-11.1%	-13.4%	0.2%	1339	-0.2%	-5.1%	11.2%	2980
VFR (TOTAL)	5.0%	-7.7%	12.1%	545	-6.3%	-8.2%	0.3%	2850	6.0%	2.4%	10.7%	6462
Business	1.5%	16.0%	-5.2%	202	8.1%	13.5%	13.1%	1120	16.4%	17.5%	22.4%	2187
Regions:												
West Midlands	-13.3%	-3.3%	7.4%	84	3.6%	2.4%	3.8%	505	8.0%	-4.5%	4.9%	1152
East of England	9.2%	7.0%	45.7%	156	-14.1%	-15.8%	4.4%	581	6.8%	4.6%	16.5%	1377
East Midlands	8.0%	4.6%	37.9%	128	-11.8%	-14.4%	6.3%	542	2.0%	-1.9%	20.6%	1193
London	9.1%	27.1%	-12.0%	134	4.1%	-4.4%	5.1%	742	1.4%	4.6%	2.5%	1518
North West	30.1%	34.5%	40.5%	186	8.7%	16.0%	16.5%	892	16.7%	14.6%	23.3%	2005
North East	65.5%	30.3%	107.1%	67	3.9%	-9.1%	22.0%	276	18.1%	6.3%	32.8%	617
South East	4.3%	1.6%	21.5%	216	6.5%	2.5%	16.7%	1106	11.9%	7.5%	22.0%	2396
South West	-17.1%	-25.1%	-14.8%	267	-9.6%	-15.3%	-11.3%	1232	-3.8%	-8.3%	-2.9%	2816
Yorkshire & the Humber	12.5%	-3.1%	10.7%	172	1.1%	-6.3%	8.9%	728	13.5%	5.6%	11.8%	1614
LOCATION TYPE:												
Seaside	-8.2%	-19.1%	-4.2%	418	-5.6%	-10.9%	-5.7%	1564	3.9%	0.4%	2.8%	3722
Large city/ large town	3.6%	13.6%	-5.8%	568	1.9%	0.8%	6.7%	3154	9.2%	7.2%	14.8%	6758
Small town	16.7%	15.3%	23.0%	424	-3.9%	-6.6%	4.5%	1870	5.9%	2.0%	10.6%	4150
Countryside/ village	-0.5%	-0.7%	32.4%	331	-5.8%	-12.5%	4.9%	1456	5.3%	-2.0%	15.2%	3310
AGE:												
16-24	-1.5%	-4.6%	18.1%	194	-5.5%	-10.8%	2.2%	956	1.6%	-5.8%	6.8%	2098
25-34	15.2%	14.6%	46.9%	282	4.8%	3.5%	19.6%	1333	10.6%	13.6%	18.2%	2934
35-44	-11.5%	-10.0%	-17.3%	344	-13.7%	-15.6%	-12.1%	1620	2.7%	-4.1%	6.1%	3745
45-54	24.1%	27.2%	22.3%	340	6.2%	4.2%	12.6%	1480	9.0%	8.9%	15.4%	3128
55+	-8.1%	-11.4%	-5.2%	521	-2.6%	-8.8%	2.1%	2470	7.7%	1.9%	11.0%	5628
SEG:												
AB	2.7%	4.1%	-1.7%	551	-2.5%	-8.5%	0.1%	2658	6.0%	-0.8%	8.7%	5733
C1	2.1%	8.2%	11.5%	518	-2.5%	-5.9%	2.4%	2439	9.7%	7.0%	11.9%	5558
C2	-0.2%	-6.0%	7.2%	299	0.3%	-2.3%	9.2%	1376	4.3%	1.5%	13.7%	3067
DE	-1.5%	-17.6%	27.9%	312	-7.4%	-8.3%	13.4%	1387	3.0%	1.5%	16.9%	3173
CHILDREN IN H/H:												
Any	4.3%	1.2%	15.6%	589	-6.5%	-7.1%	-0.9%	2653	4.7%	0.2%	9.5%	6256
None	0.2%	-1.4%	3.3%	1091	-1.0%	-6.4%	5.1%	5206	7.3%	3.4%	12.1%	11276
ACCOMMODATION:												
Commercial accom	3.6%	0.5%	1.1%	1062	3.6%	-2.1%	5.5%	4791	9.2%	4.7%	11.4%	10430
- Serviced accom	10.4%	12.1%	2.5%	653	9.7%	10.6%	12.5%	3418	14.8%	13.8%	16.8%	7142
- Hotel/motel/guesthouse	8.6%	13.4%	2.2%	567	9.4%	9.0%	11.0%	3051	15.4%	14.6%	16.7%	6365
- Bed & Breakfast	29.1%	26.8%	24.8%	88	21.7%	35.3%	43.3%	355	15.9%	19.4%	26.3%	737
Total self-catering rented	-8.0%	-9.7%	-4.2%	395	-8.7%	-12.6%	-11.1%	1243	-0.8%	-2.0%	1.3%	3045
- Camping & Caravanning (inc. owned caravans)	-10.1%	-7.6%	5.3%	316	-14.0%	-13.8%	-6.5%	913	-6.5%	-5.6%	3.1%	2231
- Other self-catering rented	-0.5%	-9.2%	-9.9%	138	-3.7%	-13.5%	-15.6%	529	5.5%	1.5%	-0.3%	1259
Hostels	100.0%	83.8%	77.8%	15	-16.2%	-9.2%	6.3%	83	-15.6%	-0.9%	-5.3%	160
Own home/friends'/relatives'	-3.7%	-8.6%	13.5%	581	-11.5%	-13.6%	-6.6%	2949	2.8%	-1.4%	9.3%	6875

	Month: June 2012			Unweighted Trips	YTD: January - June 2012			Unweighted Trips	12 month rolling June 2011 - June 2012			Unweighted Trips
	Trips	Bednights	Expenditure		Trips	Bednights	Expenditure		Trips	Bednights	Expenditure	
TOTAL	3.8%	-0.1%	12.9%	1396	-2.1%	-6.6%	5.3%	6528	6.5%	1.8%	11.1%	14475
PURPOSE:												
Pure Holiday	5.4%	0.8%	17.1%	713	-2.8%	-8.2%	4.5%	2881	3.2%	-1.1%	8.3%	6656
- 1-3 nights holiday	2.6%	1.0%	9.7%	422	0.3%	-2.0%	13.3%	1940	6.7%	4.7%	13.8%	4201
- 4+ nights holiday	10.2%	0.6%	25.1%	291	-9.2%	-12.4%	-6.7%	940	-3.0%	-4.2%	2.3%	2443
VFR (on holiday)	3.2%	-9.1%	8.2%	251	-2.6%	-6.9%	-1.3%	1289	12.8%	10.2%	9.9%	2971
HOLIDAY (TOTAL)	4.9%	-1.4%	15.9%	964	-2.7%	-7.8%	3.5%	4167	6.0%	1.8%	8.6%	9626
VFR (non-holiday)	10.8%	-5.8%	22.7%	226	-8.9%	-11.2%	0.9%	1199	-1.0%	-4.8%	9.1%	2608
VFR (TOTAL)	6.6%	-7.7%	14.3%	477	-5.8%	-8.8%	-0.4%	2489	5.8%	3.4%	9.6%	5579
Business	6.4%	24.3%	3.7%	176	7.0%	14.9%	11.8%	946	15.7%	15.0%	18.5%	1818
Regions:												
West Midlands	-13.3%	-3.3%	7.4%	84	3.6%	2.4%	3.8%	505	8.0%	-4.5%	4.9%	1152
East of England	9.2%	7.0%	45.7%	156	-14.1%	-15.8%	4.4%	581	6.8%	4.6%	16.5%	1377
East Midlands	8.0%	4.6%	37.9%	128	-11.8%	-14.4%	6.3%	542	2.0%	-1.9%	20.6%	1193
London	9.1%	27.1%	-12.0%	134	4.1%	-4.4%	5.1%	742	1.4%	4.6%	2.5%	1518
North West	30.1%	34.5%	40.5%	186	8.7%	9.0%	16.5%	892	16.7%	14.6%	23.3%	2005
North East	65.5%	30.3%	107.1%	67	3.9%	-9.1%	22.0%	276	18.1%	6.3%	32.8%	617
South East	4.3%	1.6%	21.5%	216	6.5%	2.5%	16.7%	1106	11.9%	7.5%	22.0%	2396
South West	-17.1%	-25.1%	-14.8%	267	-9.6%	-15.3%	-11.3%	1232	-3.8%	-8.3%	-2.9%	2816
Yorkshire & the Humber	12.5%	-3.1%	10.7%	172	1.1%	-6.3%	8.9%	728	13.5%	5.6%	11.8%	1614
LOCATION TYPE:												
Seaside	-9.2%	-22.7%	0.2%	332	-7.5%	-11.7%	-5.5%	1242	2.6%	-0.5%	1.9%	2963
Large city/ large town	9.3%	21.6%	2.7%	500	2.5%	2.0%	9.1%	2733	8.6%	6.6%	15.5%	5813
Small town	19.2%	14.2%	34.1%	339	-3.9%	-9.9%	1.3%	1499	5.6%	1.8%	7.9%	3308
Countryside/ village	-1.1%	1.3%	40.5%	267	-3.2%	-10.9%	14.2%	1193	6.9%	-3.1%	16.2%	2688
AGE:												
16-24	-7.2%	-13.3%	15.3%	163	-7.4%	-10.4%	2.0%	801	-0.6%	-6.3%	5.4%	1757
25-34	31.7%	42.4%	75.9%	242	11.9%	11.2%	24.3%	1135	14.8%	19.7%	22.2%	2477
35-44	-8.7%	-12.3%	-7.2%	298	-12.8%	-15.3%	-6.4%	1368	1.8%	-4.3%	6.3%	3081
45-54	26.4%	28.4%	23.1%	280	4.6%	4.6%	10.5%	1214	8.8%	6.4%	12.0%	2551
55+	-8.8%	-13.7%	-2.9%	409	-2.8%	-12.3%	3.0%	2008	7.5%	-0.3%	11.1%	4611
SEG:												
AB	11.3%	11.1%	14.2%	468	-3.6%	-9.1%	1.6%	2222	4.5%	-2.6%	7.6%	4750
C1	0.4%	6.2%	8.9%	420	-0.1%	-5.1%	4.4%	2054	11.4%	8.4%	12.1%	4656
C2	-2.5%	-9.6%	8.0%	251	-0.4%	-2.7%	11.8%	1115	4.4%	1.3%	16.1%	2484
DE	-1.2%	-19.8%	29.7%	252	-4.6%	-8.3%	15.9%	1127	2.9%	-0.3%	14.9%	2562
CHILDREN IN H/H:												
Any	8.7%	2.0%	22.2%	504	-4.3%	-5.3%	1.0%	2226	5.9%	0.9%	10.1%	5166
None	1.7%	-1.0%	9.6%	893	-1.1%	-7.1%	7.0%	4306	6.7%	2.3%	11.5%	9310
ACCOMMODATION:												
Commercial accom	7.3%	0.8%	7.6%	860	4.3%	-1.7%	7.5%	3897	8.7%	3.8%	11.0%	8458
- Serviced accom	15.5%	14.9%	8.3%	541	9.6%	10.5%	13.3%	2823	13.8%	11.9%	15.7%	5908
- Hotel/motel/guesthouse	13.4%	13.8%	6.3%	471	8.5%	7.8%	10.5%	2512	14.0%	11.9%	14.8%	5267
- Bed & Breakfast	42.9%	56.3%	55.6%	73	29.8%	48.7%	60.3%	304	20.4%	26.2%	34.3%	615
Total self-catering rented	-8.2%	-12.2%	2.0%	307	-7.2%	-11.8%	-6.8%	972	-1.5%	-2.3%	2.1%	2347
- Camping & Caravanning (inc. owned caravans)	-13.1%	-14.7%	4.6%	241	-15.5%	-18.2%	-6.5%	683	-5.2%	-5.6%	8.4%	1695
- Other self-catering rented	7.2%	-3.1%	3.8%	108	2.1%	-7.8%	-8.8%	417	2.5%	0.4%	-2.7%	946
Hostels	420.0%	432.4%	250.0%	11	-16.7%	-2.3%	4.1%	61	-16.5%	-3.1%	-12.6%	122
Own home/friends'/relatives'	-1.6%	-8.3%	18.4%	499	-10.9%	-14.0%	-5.0%	2501	3.3%	-1.1%	9.2%	5808